

Retention and Classification Report

Agency: Department of Human Services. Division of Aging and Adult Services. Adult Protective Services (2725)

, UT

Records Officer Terri Ruesch

17485	Client case files
24565	Client trust account files
17863	Investigation files

AGENCY: Department of Human Services. Division of Aging and Adult Services.
Adult Protective Services

SERIES: 17485

3

TITLE: Client case files

DATES: 1990-

ARRANGEMENT: Alphabetical by client surname

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

These files document complete case histories of clients receiving services provided in or through the Division of Aging and Adult Services. Information includes name, social security number, telephone number, and living conditions.

RETENTION:

Retain 10 years.

DISPOSITION:

Destroy provided no pending action or litigation.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 08/1996

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years after case closes and then transfer to State Records Center. Retain in State Records Center for 8 years and then destroy provided no pending action or litigation.

APPRAISAL:

Administrative

This disposition is based on the administrative needs expressed by the agency.

AGENCY: Department of Human Services. Division of Aging and Adult Services.
Adult Protective Services

SERIES: 17485

TITLE: Client case files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Department of Human Services. Division of Aging and Adult Services.
Adult Protective Services

SERIES: 24565

3

TITLE: Client trust account files

DATES: ca. 1990-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

These records document bank statements from client trust accounts and are used to manage financial and audit records. Information includes returned checks, financial statements, and bank transactions.

RETENTION:

Retain 5 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 02/2003

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 4 years and then destroy.

APPRAISAL:

Administrative Fiscal

AGENCY: Department of Human Services. Division of Aging and Adult Services.
Adult Protective Services

SERIES: 24565

TITLE: Client trust account files

(continued)

PRIMARY CLASSIFICATION:

Protected UCA 63G-2-305 (2008)

SECONDARY CLASSIFICATION(S):

Controlled. UCA 63G-2-304 (2008) Contains medical, psychiatric, and
psychological data

AGENCY: Department of Human Services. Division of Aging and Adult Services.
Adult Protective Services

SERIES: 17863

3

TITLE: Investigation files

DATES: 1979-

ARRANGEMENT: Alphabetical by region, thereunder by client surname

ANNUAL ACCUMULATION:

DESCRIPTION:

These files document Adult Protective Service investigations completed as a result of a referral alleging abuse, neglect or exploitation of a disabled or senior adult. Information includes birthdate, names, addresses, court documents, medical reports, guardianship orders, referrant names, perpetrator and victim information, and investigation results.

RETENTION:

Retain 10 years after case closes.

DISPOSITION:

Destroy provided no pending litigation.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 11/1996

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years after case closes and then transfer to State Records Center. Retain in State Records Center for 8 years and then destroy provided no pending action or litigation.

AGENCY: Department of Human Services. Division of Aging and Adult Services.
Adult Protective Services

SERIES: 17863

TITLE: Investigation files

(continued)

APPRAISAL:

Administrative

This disposition is based on the administrative needs expressed
by the agency.

PRIMARY CLASSIFICATION:

Protected UCA 63G-2-305 (2008)

SECONDARY CLASSIFICATION(S):

Controlled. UCA 63G-2-304 (2008)